PRASA DATA BID-User Manual

Potential Bidder

8/16/2012 By PGES for PRASA

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User Manual

1. Introduction

The Puerto Rico Aqueduct and Sewer Authority (PRASA) administer several procurement processes to receive the best possible value for different types of services needed within the authority. As part of the modern technology and the tendency in different government agencies to provide online information, PRASA is using an online tool known as PRASA DATA BID to manage the procurement process which integrates several key parties within the procurement procedure such as general public, potential bidders, designers, suppliers, consultants, and owner.

2. Overview

PRASA DATA BID is an online web application that provides tools for groups involved in the procurement process to manage and/or access information of different procurement phases from project conceptualization up to project award. Documents that are gathered within the system are, but not limited to:

- Agreement
- General Conditions
- Supplementary Condition
- Instruction to Bidders
- Scope of work
- Specifications
- Drawings
- Studies

- Submitted questions
- Answered questions
- Meeting Minutes
- Administrative documents
- Procurement Calendars
- Reports
- Organizations
- Participants

3. Getting Started

3.1. Browsers

PRASA DATA BID may be handled in several web browser platforms such as internet explorer 8 or recent update, Firefox, Google Chrome and Safari. For best web experience be sure your computer has the latest updated software.









3.2. General Public Access

PRASA DATA BID System permits anonymous users to see public information only as provided by the owner. The anonymous user or "Guest User" is a non-registered user that can see a complete list of projects that are undergoing a procurement process. General public information is presented such as:

- Project bid numbers
- Project name
- Project status
- Funding agency

- Participating potential bidders
- Important dates:
 - o Pre bid
 - o Bid opening
 - o Document availability

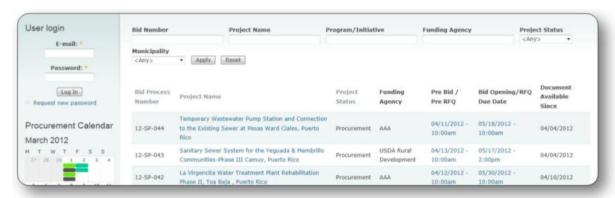
3.3. General Search Options

The system provides searching capabilities for the "Guest User" through several field boxes and drop down menus. A "Guest User" can search by different categories by:

- Bid Number
 - o PRASA Bid Numbers for Capital Improvement Projects are label "xx-SP-xxx". The first term, "xx" is for the fiscal year in which the project started the procurement process, the last term "xxx" is for the sequential number in which the project was announced during the fiscal year.
- Project Name
 - The project name field searches any word within the title of all active project names
- Program/Initiative
 - Search for different program/initiatives in which the project might be included.
- Funding Agency



- Search projects by different funding agencies
- Project Status
 - Search projects by its corresponding status
- Municipality
 - o Search projects by municipality or regions.



After providing information regarding the type of search, you must click the "apply" button to initiate the search engine. You may also delete all previous entries inside search fields by a click on the "Reset" button.

If no search selection is made then the system will present a complete list of all active projects. You may also use sorting capabilities for the first three columns: Bid Process Number, Project Name and Project Status for additional search options. These columns are highlighted in light grey to differentiate from the subsequent columns. To use the sorting options just click on top of the column label. The last three columns are specifically designed to provide a rapid view of important deadlines of the procurement process for each particular project by indicating the Pre-Bid/Pre-RFQ, Bid Opening/RFQ and Document Availability Dates.

3.4. Calendar

The system provides two sets of calendars: (a) Procurement Calendar, and (b) Project Calendar. The Procurement Calendar gathers all project deadlines and it's located at the left side of the system below the login information. The Procurement Calendar provides different set of colors which indicate several types of meeting or deadlines for each project. To see more information about a specific colored date, hover over with the mouse and specific information will be presented. Colored dates and types are discussed under the "Meetings" Section within this document.

The Project Calendar represents specific deadlines for the selected project and features work in the same way as the Procurement Calendar. Under both calendars you will find a link "View More" which will redirect the user to see the either calendar completely covering the main webpage frame.



4. Enter as "Guest"

The type of information that general public has access will be determined by PRASA officials. When a "Guest User" clicks on a project without using login credentials, brief information of the project will be presented. The PRASA DATA BID system has pre defined access menu. Three access links are provided:

View Documents:

O Access public documents, if any, as identified by PRASA for the project. An example of such document would be a site plan for a specific project to provide interest in the general public or potential bidders to participate in the procurement process.

• View Meetings:

 Access information to important procurement process deadlines such as pre bid, site visit, bid opening, document availability dates.

• View Announcements:

o Access to announcements made by PRASA for the particular project.

Guest Actions

- View Documents
- View Meetings
- View Announcements



4.1. Requesting Access

The first thing any type of person or organization that requires access to PRASA DATA BIDS must fill out the registration form, one time only. The registration form will be provided from a Board Room Representative from the PRASA. Contact (787) 999-1717 Ext.1203 for additional instruction or submit your contact information through PRASA DATA BID website at http://aaasubastas.com/contact-us link.

The information that will be requested is:

- Complete Organization Name
- Type of Organization
- Type of Contractor/Supplier
- Company Email
- Contact Information and Address
- Information about Authorized Representative

The organization requesting access to the system will receive credentials for access through the company e-mail provided on the registration form. The user will use these credentials to gain access into the PRASA DATA BID online system. The access to information will depend on the type of role designated by PRASA to the user.



5. Password Security

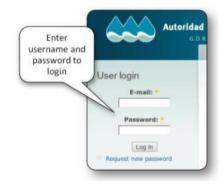
5.1. Changing your password

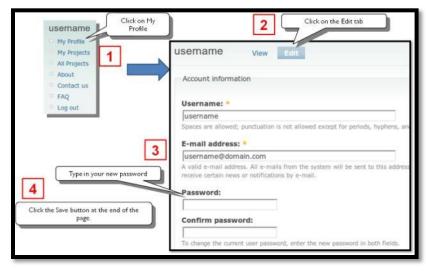
Once the user receives credentials through the e-mail provided on the registration form, it is extremely recommended that the user changes password after log in, for own security purposes. In order to log in, the user must insert credentials at aaasubastas.com website. The user name is equivalent as your e-mail that you had provided in the registration form. You can either insert

your complete e-mail address or just the e-mail without your domain.

Example: <u>pruebal@pges.com</u> or pruebal. After inserting your credential you must click on the "log in" button.

To change your password you must click on the "my profile" link provided at the top left corner of the webpage under your user name. The webpage





will redirect the user to gain access to change, as needed, your username, e-mail, and password.

An example on how to change your username, e-mail, and password on the webpage is provided. Steps are marked in red boxes to indicate the sequential process of changing your password.

After inserting the new information, you must click on the "save" button at the end of the page in order to save all changes performed.

5.2. Forgot Password

If by any chance you lost your password, you may request a new password through the "request new password" link below the "log in" button. To gain access to the new password you must have access to the e-mail that was created with the user account.

The "request new password" will redirect the user to insert the registered e-mail. After inserting the registered

e-mail, you must click on "e-mail new password" button to receive your new password.

The PRASA DATA BID system verifies that the e-mail you have provided is the registered e-mail with a valid account. After verification, you will see a green sentence indicating:

"Further instructions have been sent to you e-mail address."

Such indication means that you have completed the process of requesting a new password successfully. If a red message appears it means that the e-mail you provided is not a registered e-mail in PRASA DATA BID.

Shortly after, you will receive an e-mail from "AAA" with subject "Replacement login

information" to access your online account.

The e-mail received will have information and links to access your account and change your password. Make sure that after receiving this message you configure your e-mail to mark the









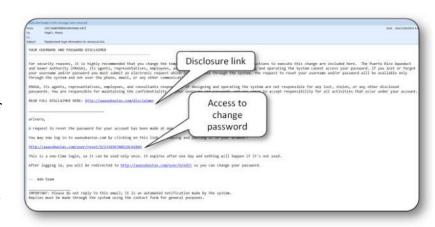
sender "AAA" in your safe list, if not, future e-mail's might be sent to your junk or spam mail box folder. There have been few occasions in which user do not receive e-mail from "AAA" at first hand, make sure to verify your organizations firewall or contact your organizations system administrator.

In order to gain access, the user must open the e-mail and click on the second link provided within the instruction paragraphs. This link will redirect the user to access the registered account in order to change password. The user must complete the same steps indicated under "Changing your

password" Section 5.1.

6. Access Roles

PRASA DATA BID manages different types of user with different access levels. These levels have been identified by PRASA so team members involved in the procurement process can collaborate with each



other. There are different types of access roles, among them:

- Potential Bidder- organization or person participating in a bid procurement process
- Board or Awards board room team members
- Consortium organizations that have contract with PRASA to manage different regions
- Designer Consultant or designer for the project designated by PRASA
- Owner PRASA officials, directors that require access to bid information
- Owner Admin PRASA's administrator personnel that will manage the PRASA DATA BID System
- Owner Management PRASA employee's that have been designated as project managers
- Owner Representative organizations that have contract with PRASA to manage different regions.
- Sponsoring Agency Representative other agencies that serve as stakeholders for PRASA
- Supplier/Contractor Organizations or people that may have access to outreach projects as required by PRASA
- View Addenda Only PRASA employees designated y PRASA officials that need access only to addendums

- Organization registered organizations under PRASA Database
- Participant personnel registered under organizations

Depending on the role provided or indicated by the BID Board Room will be the level of access that you will observe while using PRASA DATA BID.

7. How to "log in"

The Log in process is same for each user role, the difference between them are the levels of access that each user will see while using the system. To gain access, insert your user and password credential on the login box at the upper left corner of the webpage. After inserting your credentials, click on the "Log in"

button.

The system will verify the information you have inserted on the field boxes, if the information you inserted is not correct, a red message will appear to indicate that an "unrecognized username or password" was submitted.





Please re-enter the proper credentials to gain access. If problem persists, please use the "request password" link as indicated under the "forgot password" section.

7.1. Access Menu

The main access menu of your account has access to:

- "My Profile"- access your account
- "My projects" access project you are participating as a potential bidder
- "All Projects" see a complete list of projects under procurement process by PRASA
- "About" read brief information of PRASA DATA BID System
- "FAQ" frequently ask questions permits user to read common questions made by



others.

- "Log out" exit the PRASA DATA BID system
- "Contact Us" submit a message to PRASA DATA BID

7.2. My Profile

The "My Profile" link permits a user to see and change his/her account information. When the user clicks on this link, the system presents a history of all projects in which the account has access. You may also see the amount of time you have been a member inside PRASA DATA BID system. In this example, the user has been a member for "1 year and 13 weeks".

Another function under the "My profile" link is the access to create your own user profile. Under the link "create user profile" you must verify that your username has been linked with the organization that you represent.

If your organization is not present you may select one as you type in the organizations name. Then click on the "save" button to apply changes.

If by any chance, your organization does not appear

after writing the same into the field box, then please notify PRASA DATA BID for further assistance through the "Contact Us" link, or by calling (787) 999-1717 Ext.1203 for additional instructions.

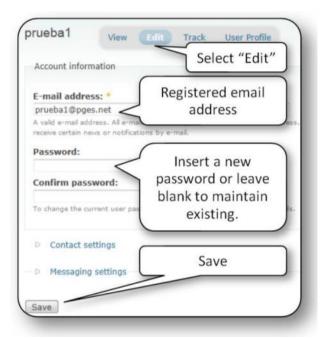




7.3. Editing My Profile

After gaining access you may edit your profile account to make changes to your username, password even or organizations e-mail if needed. Please note that it is recommended to keep the same email as submitted through the registration form. If the user changes the e-mail the profile section. regularly in correspondence from the PRASA DATA BID system will be divided in different emails accounts.

To change your profile, you must click on the "edit" blue link at top of the webpage, change the designated fields such as email and password, then click save. If you do



not want to change your password, then just leave this field box in blank and click Save.

8. My Projects

The "My projects" web page link serves for searching and accessing information of active projects that the user is participating. Searching fields are explained under Section 5. After the user logs in, the webpage redirects the user to see the complete list of "My Projects". User must click the desired project title to access information depending on your role for the project.

9. Potential Bidders

Potential bidders are the organizations or people that have acquired access to bid documents at PRASA main offices. The potential bidder must visit the Bid Board Room to present evidence of acquisition to submit the registration form and gain access to PRASA DATA BID. After receiving credentials through email and entering into the system, PRASA DATA BID automatically directs the user to "My projects" link.

The user needs to click the desired project to observe more information and functionalities such as:

• Ask questions



- The user may ask questions about the project in which will be corresponded by PRASA through addenda
- View my questions
 - o The user can see all questions made and submitted under the account.
- View documents
 - o Access all documents provided by PRASA for the current project.
- View public notices
 - Access the actual public notice that was issued by PRASA through written news media.
- View meetings
 - Access all meeting deadlines and minutes in which potential bidders have participated
- View announcements
 - o Read additional announcements made by PRASA for the current project.

9.1. View Documents

The second task a user should perform after changing their password and obtaining access into a desired project is to verify and download project documents or Contract Documents, better known by PRASA as "Volumes". These documents are located under the Volume tab. To see this section the user must click on "View documents" link and then navigate to the



"Volume" Tab located at the top of the page. You may find several tabs available such as "Reference", "Volume", "Addenda", and other documents that will be discussed under Section 9.5. More tabs will become available depending on the information provided by PRASA for a specific project.

To view a document, the user may click on the file name link or click on the document light blue title. Depending on which type of browser you're using, the system will direct you to download the document to your computer instead of performing such task online.

After viewing the document, the user may submit questions or inquiries through the "Ask a Question" link.

9.2. Ask a Question:

Potential bidders have access to submit questions or inquiries into the system regarding the project with access. Questions submitted through the system for a specific project must be filled accordingly with the following rules:

- Questions must be submitted independently, one questions per submission.
 - o Instead of submitting several questions in one complete field box, the user must submit each question independently so the Bid Board Room team can manage each question within the team of consultants involved in the project. The advantage of performing such task is that PRASA DATA BIDS maintains a record of all submitted questions, which have been answered and which questions are pending for answers. The Bid Board Room team will answer these questions through addenda and each question will be matched to the according addenda in which the question was issued.
- Question title must indicate the Request for information (RFI) number.
 - o It is for the best of parties involved, the user, PRASA and Project Team members, that questions made for a project, should have a title indicating the respective RFI number. If you need to submit 5 questions, they must be submitted independently with its corresponding RFI number in sequence. Example: RFI 1, RFI 2, RFI3, etc.

9.3. How to Submit a Question

The user must click on "Ask a Question" to request additional information or to clarify any doubts that came up after evaluating the contract documents. The webpage will direct you to an online form in which you shall submit the following:

- Title of the question
- Your Question
- Upload a document, if needed

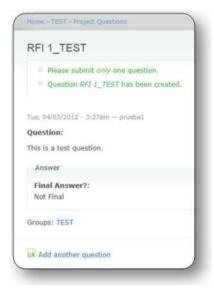
After reviewing your information, click "save" at the bottom of the page. A green message will appear indicating you have created your question successfully. This means that PRASA's procurement team involved in your project has received notification of your question, plus they can also log in for review.

You can also see the status of your question in the future to verify if a response or answer has been made to the particular question. When an answer for a question is marked as final, you see this area marked as "yes" under final answer. The answer will be posted by addenda issued.

9.4. Review questions submitted

There are two ways to access all questions submitted under your user account. The first method is by using the "Project Question" link at top of the page immediately after submitting questions and receiving delivery confirmation from the system. The webpage will redirect the user to observe the complete lists of questions submitted under the account. You cannot see questions submitted by others but you will see these questions and answers when submitted officially through addenda.







The complete question list under your account will be presented with the following information:



- User name: the account in which question was submitted
- Post date: time and date in which question was posted
- Title: The title of the questions submitted (Example: RFI 1_test)
- Question: A preview of the question that was submitted.
- File(s): Any file uploaded or associated with the question, if any.
- Addenda: The officially issued and posted addenda provided by PRASA under "View Documents" link provided in your user account actions.
- Final Answer: Indicates if a final answer has been made by PRASA indicating that an answer has been issued through addenda.



As you may have noticed, the information presented above is under the username questions tab highlighted in blue. If the user wishes to observe its own list of answered questions at a certain time, then you can change the upper tab by a click on "My answered Questions". When finished, if you desire to return to the main project information screen then just click on the project name labeled at the grey bar on top of the Questions section.

The second method to see the complete list of questions made under your account is through the main user action links or "Participant Actions".

By a click on the second link "View my Questions" the user will be redirected to the previous screen shot to see the complete list of questions submitted under the user account.



9.5. View Additional Documents

The "View Documents" link provides access to different additional tabs besides the original volumes of information as they become available. For instance, once the user has downloaded volume documents, reviewed them and submitted questions; PRASA will issue a first addendum responding either to questions submitted by all users or to provide corrections, clarifications or additional information to potential bidders. Each user shall visit the system regularly to see any additional information that may be posted. The system will also send notifications to users that new information has been issued regarding your specific project in which you participate.

Tabs become available to users depending on their respective account roles. As a Potential bidder role you may view the following documents:

• Addenda:

• View answers or clarifications to inquiries submitted or any additional information.

Volumes

 View original documents provided to potential bidders in order to participate and submit bids

Minutes

List of Meeting minutes held for the project

• Communication

 Any additional communication that PRASA would need to inform to Potential bidders about the project.

• Community Outreach

o PRASA may provide previous information from community outreach programs or meetings that could have been held as part of the project concept or development.

Reference

 Any reference document that PRASA would like to distribute online such as user manuals, regulations, etc.

These tab sections are available as PRASA issues documents on these respective sections. The current tab selection will be highlighted in light blue. Under the



selected tab you will find the document(s) pertaining to the information under such selection. Each selection will present document information such as:

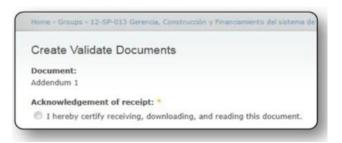
- Date: published date in which the document was uploaded into the system.
- Title: Generic title given to the document for uploading. You may click the title to download the document.
- Type: type of document in which it has been classified. Additional information regarding document types is explained under Owner Roles.
- File(s): The file name of the document. You may click the file name to download the document.
- Size: column identifying the file size of a document. Download time will depend on user connectivity.
- Receipt: link provided for users to indicate acknowledgement of receiving and downloading document. This link is only provided under the Addenda Tab.

9.6. Document Receipt

Under the view documents link, the user can download published documents by PRASA. The user must click on the document receipt link located at the last column to indicate the receipt acknowledgement and confirm that such document was downloaded by the user.

When the user clicks on "Mark as Received" link, the webpage will direct the user to certify that the document was received, downloaded and read by the user. In case that the document could not be completely downloaded or has problems





with document viewing, please ask for support using the contact us form. After certifying the document receipt, click on save at the end of the page.

10. View Public Notices

PRASA issues notices for capital improvements projects through primary public communications such as newspapers. The public notice can be viewed under the "View Public Notice" link to be downloaded with information regarding published date, newspaper and page where it can also be found.



To access this section, you need to login and click the desired project. Then click on the view public notice link and the webpage will direct the user to



download the document providing additional information about the public notice that was published. To download the document the user must click the file link provided at the last column.

11. View Meetings

A user may use the procurement or project calendar as discussed in section 3.4 to see important dates regarding the bid process. These important dates may have meeting minutes which are distributed to potential bidders through an addendum. After being issued through addendum, such meeting minutes will also be included under the "view meetings" link with its



corresponding attendance list.

To see meeting minutes, the user needs to click on the desired tab such as "Pre-Bid", "Bid Opening" meeting types in order to download.



12. View Announcements:

To view announcements the user must click on the "View Announcements" link provided in the participant actions menu. The link will direct the user to a calendar, similar to view meetings



section. The user must click on the "announcements" tab in order to read information of any announcement that PRASA may need to provide. Normally, an announcement posted for a project would be to inform document availability and amount value to obtain access to documents and bidding process.

13. Menu Options

13.1. About

The "About" link provides information about PRASA DATA BIDS.

13.2. Frequently ask questions

The "Frequently Ask questions" link provides answers to common questions made by user. The link also provides

information on how to uninstall a previous version of adobe reader and where to find and install the latest version in order to use the majority of the file format that is published in the system. You may also find links to additional PDF reader software, and install or update additional browsers. If your question is not listed, the user may submit a question through the contact us form discussed in section 13.4.

13.3. **Log Out**

When a user needs to log out from the system, click on the "Log Out" link provided at the right of the webpage. The page will direct the user to the home screen with the respective guest options.



13.4. Contact Us

The contact us link is provided in two areas. The first area is in the home screen when you are a guest user. The link is provided in the upper right corner of the screen. The second link is provided after a user logs into the system, where the link is located at the extreme left area of the screen.



14. Reference Documents

Reference documents are provided under the Utilities label. The links directs the user to see all reference documents issued by PRASA. As an example, reference documents that may be provided are the online registration form discussed in section 4.1 and this user manual guide for participants.

